Job Aid:

How Organization Administrator Maintains Agency Users

This Job Aid shows how to:

- Add or make changes to COMMBUYS users, roles and privileges.

Of Special Note:

An Organization Administrator has access to create new, modify or inactivate users for their organization(s). A department and a location must be set up in COMMBUYS prior to adding agency users. Consult with your Department Security Officer (DSO) if you are a Commonwealth Department or Secretariat and obtain appropriate permissions and guidance before assigning or changing users' roles in COMMBUYS, in addition to reviewing COMMBUYS policy.

Screenshot	Directions
	1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com/bso/) in the Browser. Log in using your Login ID and password.

Screenshot	Directions
	2. From your Organization Administrator (OA) Homepage, select **Maintain Agency Users** to add new users or edit current user profiles.
	3. COMMBUYS opens a search box allowing you to search for an existing user with several different criteria types. Below the search box is a list displaying existing users' Login ID's, first and last names, and user roles currently assigned to them. If modifying a user profile, you can click on a **Login ID** from the list or enter search criteria to find the user you want. Once you click on the Login ID, this will display the current user's attributes, roles and permissions. • To change an existing user's information click the **Edit** button next to each heading title to open further detail and make changes. The information is the same fields as adding a new user; use the following steps as a reference. If you are adding a new user, click on **Add User** either in the Search box or at the bottom of the page.

Screenshot	Directions
Add New User for: Organization DEF **User Information (fields marked with * are required)** Salutation: ▼ Alternate ID First Name*: Last Name*: Phone*: - Mobile Phone: Email*: Job Title*: Login ID*: Status*: Active ▼ Password*: Verify Password*:	4. To add a new user, fill in the required (*) information along with a standard password. The user will be prompted to change the password when they log in for the first time, so make the initial password something you can reuse (ex: commbuys1). **Login IDs** must be at least six (6) characters in length and are not case sensitive. • A Login ID must be unique and can never be changed. **Passwords** are case sensitive and must be at least 8 characters in length. • Passwords must contain both letter and numbers. NOTE: If you need to request that a user from another organization have access to your organization, you must submit that request to the COMMBUYS Helpdesk. The request must originate from the organization that the user needs access to. NOTE: Users can also reset their own passwords using either the "**My Account**" on the gray header bar (when logged in) or by using the Forgot Password link on the Home Page (if they have forgotten the password last set and have access to their email account from their user profile).
User Defaults Organization: **Operational Services Division** ⓘ Department, Location and Default Bill-to are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User Department: ▼ Location: ▼ Default Ship-to Address: Default Bill-to Address: Default Account Code: Default Purchaser: ▼	5. The **User Defaults** section is required if the user has a role of Basic Purchaser or Department Access. (Accounts Payable will be for Phase II.) • **Department:** New documents the user creates will generate with this department displayed. • **Location:** New documents the user creates will display with this location. • **Default Ship-to and Bill-to**: Use the eyeglass icon to search for addresses. Only the Bill-to is required. • **Default Account Code:** Phase II • **Default Purchaser:** Optional. New documents the user creates will generate with this purchaser assigned to the document. Enter a Department, Location and Default Bill-to for this user.

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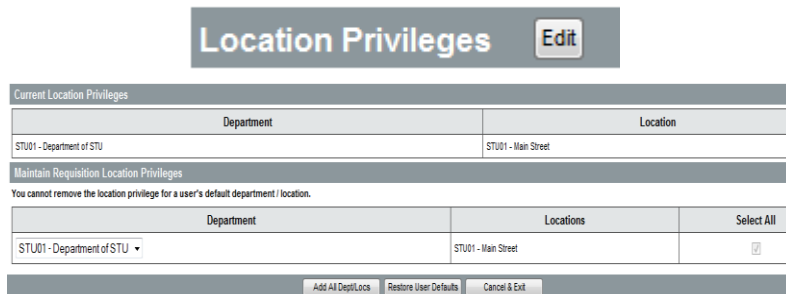| Screenshot	Directions
	6. Scroll down to **Purchasing Rules**. If a dollar amount is entered, the new user will not be able to create documents that exceed the dollar limits set. **Note**: 0.00 means there is no limit.
	7. Scroll down to **Roles** and check the appropriate boxes for user privileges. Roles determine what a user is permitted to access and what actions they can perform **Basic Purchasing** will allow the user to create Requisitions, Bids, and Purchase Orders. • BP Supervisor will allow someone to work on documents a specified Basic Purchasing user has started. A dropdown will pop-up and you will choose which BP users this supervisor will supervise. **Department Access** will allow the user to be either a Requisitioner or Contract Shopper. • Superuser allows the employee privileges to view and act on all requisitions within a department or location. • Contract Shoppers can only buy off Master Blanket Purchase Orders. • Requisitioner can create all types of requisitions. • User is an approver, gives approval rights and is allowed to be on approval paths. For both above roles, Disallow Ad Hoc Reporting removes the ability to print out reports which is shown in the upper right menu bar. **Inquiry** role can view documents but are unable to create or edit them. **Grant Template Admin Rights** allows this user to draft new reusable automatic forms pushed out to the COMMBUYS community – currently not working. Now that we have entered all the required fields to create a new user, click **Save and Exit.**

Screenshot	Directions
	8. If you chose **Department Access** user, a new section titled Location Privileges will populate below the Roles field. You can add or delete department and/or location privileges for this user. • Department superuser – allows access to the department selected. You can then add additional departments to their profile. • Location superuser – allows access to the location selected. You can then add additional locations within that department or a new department within your organization. **NOTE:** You may also give this user the ability to buy for all departments and locations by selecting **Add All Dept/Locs**. • You may restore user's original department and location by pressing **Restore User Defaults**.